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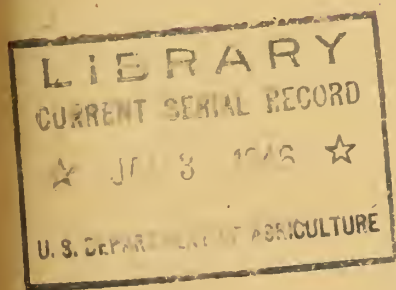
Foreign Crops and MARKETS



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L A T E N E W S

The 1945 Italian wheat crop has been officially estimated at 4.7 million short tons, compared with earlier estimates varying from 4.3 to 4.6 million tons. The estimate was prepared by the Ministry of Agriculture in collaboration with other Government agencies and with approval of the Allied Commission.

Guatemalan coffee exports from the beginning of the 1945-46 coffee year, October 1, 1945, through November 17, 1945, totaled 72,607 bags (of 132 pounds), compared to exports of 43,480 bags in the same period of the preceding coffee year. Total exports in both years went to the United States. Stocks in ports on November 17 totaled 16,422 bags.

Average monthly food rations in Greece during the past 3 months for all consumers have been officially announced as follows (in grams); Wheat bread or flour 9,480; dried vegetables 640; sugar 256; oil or fat 192; soap 96; macaroni 1,920. Hospital patients receive 2,500 calories daily.

The outlook for next year's corn crop in South Africa is very dark on account of continued drought which is resulting in late and decreased planting. Present supplies of corn are said to be very small.

Total hogs in Denmark on November 17 are reported at 1,883,000 head. This represents a gain of 85,000 head over total numbers on October 6, but a decline of 106,000 head from mid-November 1944. The increase over last month is attributed to the greater number of hogs classified as young pigs and slaughter hogs.

Bred sows, total sows, and suckling pigs on November 17 are reported at 125,000, 209,000, and 477,000 head, respectively. These totals are only slightly smaller than the number reported 6 weeks earlier. On the other hand, current sow numbers are 16 percent larger than the low level of last year.

* * * * *

WORLD FLAXSEED PRODUCTION LARGER 1/

World flaxseed production for 1945 is estimated at 156.7 million bushels or 6.3 million larger than the September estimate (Foreign Crops and Markets, September 24, 1945, page 172). This total is 26 percent greater than the 1944 outturn and 10 percent larger than the 10-year (1930-1939) average.

The first official forecast of 55 million bushels for Argentina is larger than anticipated earlier in the season and represents an unusually high yield per sown acre. The previous crop in Argentina was only 31 million, and the prewar (1935-1939) average was 60 million. The 1945 sown acreage is small owing to drought at seeding time, but favorable weather has been reported during the growing season. Although Uruguay has not released an official estimate for this season, production is expected to be above average, as acreage is the largest since 1939, when the harvest exceeded 5 million bushels. Total production in North America represents an increase of 10 million bushels over the 1944 outturn, and is more than three times the prewar production.

There is no change from the previously reported total European output of 7.5 million bushels. Production in 1944 was 10.3 million and the prewar (1935-1939) figure 9.4 million. Belgian production is larger than in recent years and compares favorably with the 1930-1939 average. Italy has not released an estimate for 1945; however, figures for 1943 and 1944 show an increase over earlier years. Netherlands flaxseed production is somewhat smaller than in the period of German occupation. The crop of 16 million bushels in Asia is 1 million less than in 1944 and 4 million smaller than the 1935-1939 average. Most of the Asiatic production is in India.

1/ The table accompanying this world summary appears on pages 352-353.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, chairman, C. M. Purves, Fred J. Rossiter, Regina H. Boyle, Helen Francis, Louise E. Butt, and Victor B. Sullam.

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WORLD DRIED-PRUNE PRODUCTION LARGEST SINCE 1939 1/

The 1945 world dried-prune production, in the nine leading commercial producing countries, is estimated at 248,300 short tons, compared with 179,600 tons in 1944 and 240,300 tons in 1943. The estimate is 7 percent larger than the 5-year (1939-1943) average of 233,100 tons and 4 percent smaller than the 10-year (1934-1943) average of 259,300 tons. Estimated output in the United States, Argentina, Yugoslavia, Rumania, and Bulgaria

Flaxseed: Acreage and production in specified areas, year of harvest, averages 1930-34 and 1935-39, annual 1943-45 a/

Continent and country	Acreage			Production				
	Average	1943	1944	1945 b/	Average	1943	1944	1945 b/
	1930-34 : 1,000 : acres	1935-39 : 1,000 : acres	1943 : 1,000 : acres	1944 : 1,000 : acres	1930-34 : 1,000 : bushels	1935-39 : 1,000 : bushels	1943 : 1,000 : bushels	1945 b/ : 1,000 : bushels
North America:								
United States	2,108	1,451	5,847	3,863	11,512	10,991	51,946	35,648
Canada	432	307	2,948	1,959	2,359	1,508	17,911	7,432
Mexico	9	16	105	(140)	81	111	1,145	(1,181)
Estimated total	2,600	1,800	9,000	5,100	14,000	12,700	71,100	44,400
Europe:								
Poland c/	253	d/			1,974	d/	2,817	e/
Lithuania c/	148	205			1,009	1,358	2,157	
Latvia c/	105	164			533	801		
Rumania c/	55	54			415	339		
Estonia c/	51	66			288	366		
France c/	44	92			363	464	607	546
Belgium c/	35	75		60	294	664	282	
Hungary	31	19			252	283		
Yugoslavia c/	29	33			137	52		
Czechoslovakia c/	22	d/			127	d/		
Germany c/	18	d/			187	d/		
Netherlands c/	17	42			175	546	403	(230)
Italy	14	16		22	139	202	320	
Austria	4	d/			24	d/		
Bulgaria c/	1	5			10	52		
Estimated total	850	1,300	1,200	950	5,900	9,400	10,500	7,500
Soviet Union c/	6,726	d/	5,805		29,865	d/29,526		

showed marked increases over 1944, while that in France, Australia, and South Africa was down sharply and that in Chile declined slightly.

PRUNES, DRIED: Estimated production in specified countries, average 1934-1943, annual 1942-1945
(Rounded to nearest 100 short tons)

Countries	Average: 1935- 1939	Average: 1934- 1943	1942	1943	1944 <u>a/</u>	1945 <u>a/</u>
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Bulgaria	9,400:	7,500:	6,500:	8,000:	2,000:	3,000
France	4,700:	3,600:	1,000:	2,700:	3,800:	1,100
Rumania	12,000:	8,500:	7,900:	6,000:	1,100:	7,700
Yugoslavia	30,500:	19,100:	6,600:	7,600:	1,100:	8,800
Europe total ...	56,600:	38,700:	22,000:	24,300:	8,000:	20,600
Argentina	1,500:	1,800:	2,100:	2,900:	2,200:	3,300
Australia	2,900:	2,900:	3,500:	3,100:	3,600:	1,800
Chile	1,100:	1,000:	1,200:	<u>b/</u> 900:	<u>b/</u> 1,000:	<u>b/</u> 800
South Africa	1,100:	1,100:	1,900:	1,100:	1,600:	800
Southern Hemisphere total:	6,600:	6,800:	8,700:	8,000:	8,400:	6,700
United States	237,900:	213,800:	177,100:	208,000:	163,200:	221,000
World total	301,100:	259,300:	207,800:	240,300:	179,600:	248,300

Office of Foreign Agricultural Relations. Compiled from official sources or estimated on basis of available trade and other information.

a/ Preliminary estimate.

b/ Revised.

World production of this commodity during the last 15 years has fluctuated between the high of 345,600 tons in 1935 and the low of 179,600 tons in 1944. During the 5-year (1935-1939) period, the United States production amounted to 79 percent of the world total, while European countries accounted for 19 percent, and Southern Hemisphere countries the remainder. European production during the 1930's was increasing gradually and reached its peak in 1939 with 11,700 tons. Southern Hemisphere countries as a whole gradually increased production during the same period, although individually some reduced output while others rapidly increased it. As a result of the war and adverse weather during the war period, total European production decreased. The demands for dried fruit from nations at war, on the other hand, stimulated an expansion in production in certain of the Southern Hemisphere countries, and output had increased about 25 percent.

In the current marketing year only the United States, Argentina, and Chile had readily available stocks for export. The Balkan countries have dried prunes available, but they are faced with a great many problems which prevent delivery. France has the smallest production since 1942 and will be an importer rather than an exporter. This situation prevailed

for years even before the war. The 1945 production in Australia and South Africa was largely consumed by the armed forces. There should be no difficulty in moving the 1945 prune crop for the lack of buyers. The problems of making shipments and financing them are the principal trade hindrances this season.

The future of the world's dried-prune business is of considerable concern to the United States growers, packers, and exporters, who no doubt recall the struggles during the 1930's with large surpluses and low prices. In view of the many unpredictable factors at this time, prospects at best are less bright than they were in prewar years. The Southern Hemisphere countries, especially Argentina and Chile, have stepped up production, and in the near future can be expected to enter the European market more actively as increased quantities become available at competitive prices. The Empire preference scheme, if continued, will enable Australia and South Africa, in a limited way, to compete in the important United Kingdom market. In addition, the United Kingdom, for economic and other reasons, may find it expedient to purchase everything possible in those countries.

Production in the Balkan countries, while somewhat smaller than the high 1939 level, as a result of the war and other reasons, may be expected to stage a partial comeback as agricultural conditions improve and trees planted in the 1930's reach maturity. The French market may be revived, but certain indications now point to a possible participation by the Government. Importers, therefore, may find their business in prunes somewhat more complicated.

In addition, improvements developed during the war in transportation and storage facilities, when made available for civilian use, may result in a much larger consumption of fresh fruit in Europe to the loss of dried fruits. The frozen food trade, developed so successfully in the United States, may eventually expand to include more varieties of fruits than at present and may affect dried-fruit sales in the United States.

A shortage in dollar exchange will tend to prevent many of the former European markets from buying United States dried prunes for several years. The Southern Hemisphere markets, never important outlets in prewar years, will be gone, and prunes from there will be in a position to compete for the European business.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, chairman, C. M. Purves, W. R. Schreiber, Clayton E. Whipple, Robert J. Manovill.

1/ A more extensive statement on this subject is available upon request to the Division of Foreign Information and Statistics, Office of Foreign Agricultural Relations.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

ARGENTINE WHEAT CROP SMALLER THAN AVERAGE; FEED GRAINS LARGER

The current wheat harvest in Argentina is considerably smaller than average, while outturns of other small grains are somewhat larger, according to the first official forecast. The wheat production is estimated at 165,749,000 bushels, which though slightly larger than last year's small crop, is about 35 percent less than the average during 1938-1942. The barley crop, as placed at 46,480,000 bushels, is the largest on record. The oats and rye crops are among the largest on record, though in the case of oats, the crop is somewhat smaller than the 1944 outturn.

The reduction in the wheat outturn, as compared with average, is attributed to both reduced seedings and smaller yields per acre. The seeded acreage is placed at 14,184,000 acres, whereas the seeded area during 1938-1942 averaged 18,333,000 acres. The indicated average yield from the area sown is 11.7 bushels, compared with an average of 14.0 bushels. At that level, yields are surprisingly low as earlier trade in-

ARGENTINA: Grain acreage seeded, yield per acre, and production, average 1938-39 to 1942-43, annual 1942-43 to 1945-46

	Average:				
	1938-39:	1942-43:	1943-44:	1944-45:	1945-46 ^a :
	to				
	1942-43:				
	1,000	1,000	1,000	1,000	1,000
Acreage seeded:	acres	acres	acres	acres	acres
Wheat	18,333	16,983	16,830	15,369	14,184
Oats	3,831	4,782	5,306	4,927	4,181
Barley	1,952	1,456	1,774	1,862	2,555
Rye	3,012	4,367	4,511	3,979	3,704
Yield per seeded acre ^b /	Bushels	Bushels	Bushels	Bushels	Bushels
Wheat	14.0	13.8	14.8	9.8	11.7
Oats	11.3	8.4	12.0	15.4	15.5
Barley	12.2	11.0	18.6	14.1	18.2
Rye	3.3	1.4	4.9	1.9	4.4
	1,000	1,000	1,000	1,000	1,000
Production:	bushels	bushels	bushels	bushels	bushels
Wheat	256,568	235,157	249,855	150,108	165,749
Oats	43,127	39,958	63,713	75,694	64,898
Barley	23,787	16,075	33,005	26,308	46,480
Rye	10,019	5,941	21,936	7,456	16,338

From official sources. ^a/ First estimate.

^b/ Includes acreage for pasture and forage.

formation had suggested around average yields. Drought in some areas as well as some insect and rust damage was said to have contributed to the low yields.

Yields of other grains were larger than average, on a seeded basis. Acreage pastured and cut as forage, however, is included in the acreage figure.

CANADIAN FLOUR MILLING SETS NEW RECORD

Flour milled in Canada during the past season reached 24,684,403 barrels, exceeding the previous record established during 1943-44 by about 380,000 barrels. The wheat processed to achieve that outturn was reported at 109,464,388 bushels or about 25 percent of the 1944-45 crop.

Record flour exports during the year, placed at 13,924,000 barrels, compare with the previous record of 13,464,000 barrels in 1943-44. The largest importer of Canadian flour was the United Kingdom, which took approximately 44 percent of Canada's flour exports during the past season.

An important byproduct of the milling industry, millfeeds amounted to 815,672 tons in 1944-45. Virtually all of this feed was utilized in Canada owing to the shortage of other protein feeds.

CANADA: Wheat milled, flour produced, and flour exports, 1943-44 and 1944-45

Month	Wheat milled		Flour produced		Flour exported	
	1943-44	1944-45	1943-44	1944-45	1943-44	1944-45
	1,000	1,000	1,000	1,000	1,000	1,000
	bushels	bushels	barrels	barrels	barrels	barrels
August.....	8,341	8,936	1,888	2,016	1,121	753
September..	8,946	8,728	2,014	1,973	874	1,216
October ...	9,349	9,105	2,119	2,048	850	1,091
November...	9,607	10,259	2,176	2,307	858	982
December ..	9,584	9,031	2,173	2,029	1,106	1,242
January ...	8,988	9,177	2,041	2,068	1,125	840
February ..	9,195	8,396	2,088	1,892	854	1,032
March	9,921	9,603	2,267	2,161	1,226	1,238
April	8,540	9,382	1,949	2,126	1,543	1,368
May	8,620	9,319	1,962	2,108	1,576	1,401
June	8,271	9,435	1,870	2,134	1,333	1,613
July	7,710	8,093	1,742	1,822	998	1,148
Total	107,672	109,464	24,289	24,684	13,464	13,924

From official sources.

Grindings of other grains during the past season showed a marked increase for oats, but smaller quantities of corn, barley, rye and mixed grain processed.

CANADA: Grindings of coarse grains,
1942-43 to 1944-45

Year	Oats	Mixed grains	Barley	Corn	Rye
	1,000	1,000	1,000	1,000	1,000
	bushels	bushels	bushels	bushels	bushels
1942-43	15,183	31,483	5,451	2,551	171
1943-44	19,979	27,098	9,332	2,048	228
1944-45	23,764	26,787	8,066	1,872	215

From official sources.

EGYPTIAN RICE
PROSPECTS IMPROVE

The 1945 harvested rice acreage in Egypt is officially estimated at 654,000 acres, compared with 643,000 last year. Rice production has not been estimated, but unusually warm weather in August and September improved crop prospects, and production now is expected to approach last year's return of 39.9 million bushels (1,165 million pounds milled). A reduction in the yield per acre was expected early in the season as a result of late sowing and shortage of irrigation water.

An agreement between Great Britain and Egypt has been reached for acquisition of this year's rice surplus by the British Ministry of Food. The amount of the surplus is placed at 330 million pounds of milled rice, or about the same as the quantity obtained by the Ministry of Food from the 1944 crop.

FATS AND OILS

DECREASED SESAME ACREAGE
REPORTED IN INDIA

India's second official sesame forecast indicates an acreage of 2,448,000 acres for 1945-46, against the corresponding figure of 2,535,000 and the final one of 3,970,000 for 1944-45. This forecast is based on reports from Provinces and States which comprise approximately 86 percent of the total sesame acreage. Estimates for the "mixed" crop of the United Provinces and for late crops of Madras and Bengal, however, are excluded.

CHILEAN SUNFLOWER-SEED
ACREAGE REDUCED

The 1945-46 Chilean sunflower-seed acreage, officially forecast at 43,500 acres, represents a decrease of 15 percent from the 51,000 planted in 1944-45. This is the first time in 6 years that the area has been smaller than that of the previous year. The principal reduction took

place in the Provinces of O'Higgins and Curico, where 6,995 acres less were planted than in the previous year.

This acreage decrease is surprising since the Government had proposed a further expansion in sunflower-seed acreage as well as that planted to other oilseeds in view of Chile's effort to become self-sufficient in edible vegetable oil production.

CHILE: Sunflower seed area, yield and production,
1945-46 with comparisons

Year	Area	Yield per	Production
	Acres	acre	1,000 pounds
		Pounds	
1940-41	8,414	1,018	8,566
1941-42	17,571	929	16,328
1942-43	24,497	1,157	28,353
1943-44	33,872	1,177	39,875
1944-45a/	50,972	1,213	61,839
1945-46	43,509	b/	b/

Compiled from consular reports.

a/ Revised.

b/ Not available.

NORWAY'S WHALE OIL OUTPUT
LARGEST SINCE PREWAR

During the 1945-46 season, total Norwegian production of whale oil is expected to reach about 100,000 short tons or about one-half that of prewar. Before the war Norway was the world's second largest producer of whale oil, ranking next to the United Kingdom in output.

Because of the limited catch in recent years and the large world demand for fats and oils, the 1945-46 season will be the most important since the prewar years, and will be extended 4 weeks longer than the customary 13-week period from December to March.

During the war a portion of the whaling fleets was lost. Consequently, Norway will send only 5 floating factories to Antarctic water compared with 12 in 1939. Also, fewer catcher boats will be operating.

COTTON AND OTHER FIBERS

EGYPTIAN COTTON
EXPORTS LAGGING

Cotton exports from Egypt during the last 4 weeks of October were equivalent to about 64,000 bales (of 478 pounds net). This total is larger than the 30,000 bales exported during the previous 5 weeks, but both figures are considerably less than the April-August monthly average

of 106,000 bales. The sudden decline in export trade may be attributed in part to the 10 percent increase in cotton support prices, authorized by the Government on July 9, 1945. The heavy export movement that began after VE-Day was directed mainly to India, the European continent and to a lesser extent the United States.

The following table shows cotton exports from Egypt during the war years, 1939-40 to 1944-45. Figures for some countries of destination are not yet available separately but are included in the totals.

COTTON: Exports from Egypt by countries,
average 1934-1938 and years 1939-1944
(Bales of 478 pounds net)

Countries of destination	Year beginning August 1						
	Average: 1934- 1938	1939	1940	1941	1942	1943	1944
	1,000: bales	1,000: bales	1,000: bales	1,000: bales	1,000: bales	1,000: bales	1,000: bales
United Kingdom ..	554.4	636.2	266.0	613.3	77.1	417.6	355.1
British India ..	99.9	118.5	170.8	92.7	247.7	224.2	244.4
United States ..	48.8	56.9	113.5	195.6	15.6	103.3	39.4
Portugal	7.3	12.3	3.2	6.0	3.6	3.5	8.5
France	215.2	313.5	-	-	-	-	48.2
Germany	171.6	11.6	-	-	-	-	-
Italy	114.7	96.7	-	-	-	-	0.2
Switzerland	71.1	68.4	-	-	-	-	a/
Czechoslovakia....	59.9	1.1	-	-	-	-	-
Spain	43.6	9.7	-	-	-	15.1	-
Rumania	b/ 52.0	35.0	-	-	-	-	-
Poland & Danzig	38.5	3.5	-	-	-	-	-
Belgium-							
Luxemburg	18.7	14.5	-	-	-	-	10.9
Austria	18.4	c/	-	-	-	-	-
Hungary	18.3	17.9	-	-	-	-	-
Sweden	12.3	10.7	-	-	-	-	-
Greece	5.9	7.5	4.9	-	-	-	-
Netherlands	5.7	5.2	-	-	-	-	-
Japan	148.5	143.5	76.8	-	-	-	-
China	20.9	38.3	8.9	-	-	-	-
Canada	7.1	14.5	5.5	5.5	-	-	-
Others d/.....	34.7	23.4	59.0	193.8	39.6	30.3	103.1
Total	1,746.7	1,638.9	708.6	1,106.9	383.6	794.0	809.8

Compiled from Monthly Summary of the Foreign Trade of Egypt.

a/ Less than 100 bales. b/ Three year average. c/ Included in Germany.

d/ Figures for 1940 to 1944 include data for some of the above listed countries for which separate data are not available.

Prices of Karnak and other extra long staple varieties decline by more than 2 cents per pound during November and are now at support levels. Practically all sales of new crop cotton have been to Government buyers.

The export tax of 20 piasters per kantar (84 cents per pound) was abolished (for new crop cotton) on September 24, 1945. This tax was imposed in 1930 at 10 piasters and raised to 20 piasters in January 1944. The practical effect of the tax revision is to earmark new-crop Ashmouni and Zagora for export and old-crop stocks for local consumption.

The British Cotton Co-Ordinating Commission in Egypt was abolished in September 1945, which means that the British Government has discontinued its wartime operations as purchaser of Egyptian cotton for other countries but will continue to purchase cotton for use by British mills.

The second official estimate, released on December 7, places the 1945 cotton crop at 5,265,000 kantars (1,091,000 bales of 478 pounds), including 790,000 bales of extra long staple over 1-3/8 inches, 2,000 bales 1-1/4 to 1-3/8 inch staple, 269,000 bales 1-1/8 to 1-1/4 inch staple, and 30,000 bales of scarto. This total is 2,000 bales less than the first estimate and considerably larger than the final estimate of 962,000 bales for 1944.

The maximum area on which cotton may be planted in 1946 was fixed late in July by Government decree at 1,088,000 acres, only 2,000 acres more than the authorized acreage for 1945 and 66,000 acres larger than the estimated area planted this year. The authorized acreage was distributed in such a way as to reduce the cultivation of extra long staple varieties and to increase the production of Ashmouni by a similar amount. Since the end of the war there has developed in Egypt a strong movement to permit the planting of more than 1.5 million acres of cotton in 1946, about 82 percent of the 1935-1939 average. Nevertheless, a continued shortage of fertilizer and the failure thus far of cotton exports to reach anticipated high levels may prevent any appreciable diversion of land from food crops back to cotton in 1946.

GUATEMALAN ABACA PRODUCTION RISES

Abaca output during 1945, the first full year of production, is now expected to reach approximately 4 million pounds, or considerably more than expected heretofore. Since the widespread drought was broken early in the year, weather has been more favorable. The Guatemala plantations were begun in 1943, and the first cuttings were made in 1944. As more plants reach maturity, the monthly fiber production increases. The present rate is near 500,000 pounds per month.

Abaca is exported as soon as it is produced, leaving no stocks in the country, except those at the port awaiting transportation. Nearly 300,000 pounds were shipped during July, 400,000 during August, and considerably more than 400,000 during September, making a total of more than 1.1 million pounds during the third quarter of 1945. In addition, abaca tow exceeding 100,000 pounds was exported during the quarter. All shipments were to the United States.

Other fibers exported during July-September 1945 included about 21,000 pounds of sisal to Costa Rica and 62,000 pounds of broomroot to Chile.

WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Price of certain foreign growths
and qualities in specified markets

Market location, kind and quality	Date 1945	Unit of Weight	Unit of Currency	Price in: foreign currency	Equivalent U.S. cents per pound
Alexandria (spot)	:	Kantar	:	:	:
Ashmouni, F.G.F.....	11-29	99.05 lbs.	:Tallaris:	32.50	27.19
Giza 7, F.G.F.....	11-29	99.05 lbs.	:Tallaris:	Not quoted	
Karnak, F.G.F.....	11-29	99.05 lbs.	:Tallaris:	38.50	32.14
Bombay (Jan. futures)	:	Candy	:	:	:
Jarila.....	11-29	784 lbs.	:Rupee	411.50	15.81
Bombay (spot)	:	Candy	:	:	:
Kampala, East African...	11-29	784 lbs.	:Rupee	850.00	32.66
Buenos Aires (spot)	:	Metric Ton	:	:	:
Type B.....	12-1	2204.6 lbs.	:Peso	1300.00	17.56
Lima (spot)	:	Sp. Quintal	:	:	:
Tanguis, Type 5.....	12-1	101.4 lbs.	:Sol	106.00	16.08
Recife (spot)	:	Arroba	:	:	:
Mata, Type 5.....	11-30	33.07 lbs.	:Cruzeiro:	80.00	13.17
Sertao, Type 5.....	11-30	33.07 lbs.	:Cruzeiro:	82.00	13.50
Sao Paulo, (spot)	:	Arroba	:	:	:
Sao Paulo, Type 5.....	11-30	33.07 lbs.	:Cruzeiro:	91.00	14.98
Torreon (spot)	:	Sp. Quintal	:	:	:
Middling, 15/16".....	12-1	101.4 lbs.	:Peso	88.75	18.01

Compiled from weekly cables from representatives abroad.

TOBACCO

CUBAN TOBACCO PRODUCTION UP SLIGHTLY; EXPORTS REDUCED

Cuban tobacco production during the 1944-45 season (spring harvest of 1945) is estimated by the Tobacco Commission at about 69.1 million pounds, compared with a crop of 65.7 million in 1943-44. Although the 1944-45 acreage was considerably larger than in the previous year, drought conditions reduced yields, and the outturn was not much greater. Reports indicate that the quality of 1944-45 crop leaf was below average and that the percentage of filler grades suitable for the United States market showed a marked drop. Forecasts place the 1945-46 acreage at about the same as the 1944-45 area.

Exports of unmanufactured tobacco during the first 9 months of 1945 amounted to 17.5 million pounds, compared with 20.1 million during the corresponding period of 1944. About 80 percent of the 1945 exports, or 13.9 million pounds, went to the United States. The leaf exported to this country consisted chiefly of stemmed filler. Other principal importers of leaf tobacco in 1945 were Canada, Argentina, Chile, and the Canary Islands.

Exports of cigars during the first 9 months of 1945 amounted to 37 million pieces, or 27 percent less than the 119 million exported during the corresponding period of 1944. The United States took 53.6 million during the period January-September 1945, while the other chief customer was Spain, which took 26 million. Exports of other tobacco products were insignificant.

LIVESTOCK AND ANIMAL PRODUCTS

CUBAN CATTLE NUMBERS SHOW DECLINE

Cuban cattle numbers in 1945 indicated at 4 million head show a decrease from the 5,334,813 head reported in the census taken late in 1940, according to a final census report made this year. Reasons given for this decline are prolonged drought and excessive slaughter. The trend in intervening years is difficult to ascertain as the annual estimates prepared each year by the Cuban Ministry of Agriculture are not correlated with the census figures. These figures for 1944, however, also indicate a drop of about 1 million head compared with 1938.

While the 1945 census enumerated and classified 3,884,158 head, the Ministry estimates that this census may have failed to include 3.6 percent of the cattle population or 142,000 head, bringing the total count to slightly more than 4 million. The latter figure is accepted generally as a conservative round figure for estimating Cuba's present cattle population.

Of the total of 3,884,158 head enumerated, breeding and dairy cattle represented 2,234,000 head. This was a reduction of 20 percent below the 1940 census. Milk cows alone, estimated at 495,000 head were 17 percent less than in the earlier census. The stock of beef cattle in 1945 was estimated at 1,317,000 or 25 percent less than in 1940. The only increase noted in this group was in 2-year-old animals, which showed an increase of 21 percent to 407,292. The large decrease in 3-year-olds reflects the heavy demand for beef.

Curtailement of salt pork exports by the United States has resulted in increased consumption of beef. The beef output, however, has not been sufficiently large to satisfy the increased consumer demand resulting from increased purchasing power and, consequently, frequent meat shortages have resulted. The ban on beef exports declared in 1942 still

remains in effect and is likely to be maintained for several years. During the war the ban was lifted from time to time for short periods to permit emergency war shipments. From 1936 to early 1942 there was a small export surplus reaching a maximum in 1941, when 43 million pounds of beef were shipped out, principally to the United States.

CUBA: Cattle census,
1945 with comparison

Detailed classification	1940 <u>a/</u>	1945 <u>b/</u>
	Number	Number
<u>Breeding and dairy</u>		
Bulls	242,811	265,198
Milk	594,793	495,354
Other cows	1,041,240	769,820
Calves	919,361	703,492
Total	2,798,205	2,233,864
<u>Beef stock</u>		
Yearlings	764,728	541,699
Two-year olds	337,570	407,292
Three-year olds	645,608	367,650
Total	1,747,906	1,316,641
<u>Other</u>		
Oxen	408,406	333,653
Unclassified.....	380,296	-
Total	788,702	333,653
Total cattle	5,334,813	<u>c/</u> 3,884,158

Cuban Ministry of Agriculture.

a/ Census taken December 31, 1940. b/ Census taken early in 1945.

c/ Rounded figure of 4 million head accepted, as the Ministry of Agriculture calculates that cattle not enumerated may be 3.6 percent of these figures which would increase the total by 142,000 head.

CANADA ANNOUNCES 1946
EGG AND POULTRY PROGRAM

Canadian officials estimate the 1946 production of eggs at 378 million dozens, compared to a record production of 395 million dozens in 1945. Domestic requirements are placed at about 292 million dozens for each year, leaving supplies available for export at about 120 million dozen in 1945 and 87 million dozen in 1946. The latter amount is just sufficient to fill the 1946 egg contract with the British Ministry of Food.

The 1945 poultry production is estimated at 286 million pounds. A similar output is recommended for 1946. Production at this level is about 10 percent less than the peak figure of 315 million pounds in 1944. With reintroduction of meat rationing, domestic use of poultry in Canada has been unusually heavy, and the anticipated 20 to 25 million pounds has not been available for export. If red meat available to consumers continues to be limited in 1946, a continued high level of domestic demand for poultry is anticipated.

WORLD TRENDS IN
OUTPUT OF DAIRY PRODUCTS

During the third quarter of 1945, the output of dairy products in most of the world's important producing countries fell below that for the same period last year. Butter production continued to decline generally. In addition cheese and canned milk output dropped off in some countries. The outstanding exceptions are the seasonally large production of cheese and canned milk in the United States and Canada in the third quarter of 1945, compared to a year earlier, and the seasonally high output of dried milk reported in the principal producing countries.

The heavy requirements for liberated areas and deficit producing countries, together with strong civilian demand in the United States and Canada, have kept supplies of cheese, canned, and dried milk from piling up, despite slackening of military needs. In addition, the heavy demand by civilians in producing countries, especially United States and Canada, for fluid milk and cream, as well as specialty dairy products, will tend to prevent any general oversupply in dairy products before the middle of 1946, if then.

Pasture conditions and available feed supplies in much of the world are not especially favorable to milk production. Again the exception is the United States, where abundant feed supplies and favorable product-feed price ratios are enabling producers to feed liberally. The reduced milk production in most of the liberated areas continues to be needed largely for fresh consumption, and the output of dairy products is thus restricted except in Denmark. In the United Kingdom, milk sales in the third quarter reached 3,736 million pounds, compared to 3,613 million in the same period last year, but the quantity used for manufacturing was only 449 million pounds, compared to 453 for the third quarter of 1944.

Butter production in the third quarter of 1945 continued to show a decline in most countries, with the general level of output averaging about 20 percent less than prewar. In New Zealand, the indicated butter output in the slack months of July-September fell about 8 percent below a year ago, after having been well above last year in the early months of 1945. Butter output was maintained in Canada, where it is much depended upon as a table fat. Since May, butter output in Denmark has been the largest of any year since 1940, despite the small supply of feed concentrates. The increased output is attributed largely to exceptionally favorable pastures, but with the coming of indoor feeding, production will decline more than seasonally. The total Danish output for 1945 will approximate 70 percent of prewar.

In continuation of the high level of output during the early months of the year, cheese production in the United States and Canada for the third quarter was larger than the production a year ago. For New Zealand, however, cheese production for the third quarter dropped off from the relatively high level that prevailed from January to June. Export gradings for the quarter indicate output at 6 percent loss than a year

earlier. Australian cheese production, on the other hand, has been maintained at near the level of a year ago. Cheese output declined more than seasonally in Argentina during the late winter and early spring months of July to September, and the level of production for the quarter was down 9 percent from a year ago.

The canned milk output in the United States and Canada during the third quarter was maintained well above a year earlier, and these countries continue as the leading source of supply for overseas shipments. On the other hand, production continues to drop off in Australia, Cuba, Argentina, and possibly in the United Kingdom.

Dried milk production in the third quarter this year continued high in the United States and Canada, but the increases over the same quarter a year ago were only 8 and 6 percent, respectively, compared to increases of 21 and 14 percent, when comparing the first 6 months of this year with a year earlier. In Argentina the production of dried milk in the third quarter period dropped nearly 40 percent below the output in the same months last year, whereas, for January to June, production had been 65 percent more than the first 6 months of 1944. For the first 8 months of 1945, dried milk production in Australia was maintained at 106 percent of the same period for 1944.

Current Conditions Abroad: In Canada, an unanticipated falling off in milk production during October and November is adversely affecting the output of manufactured dairy products in the final quarter of the year.

The production of dairy products in Argentina continued to improve seasonally during November, but the overall situation relative to milk production is not as favorable as a month ago because of insufficient rains in November in some of the producing areas. Production has not reached the level of last year because of unfavorable pasture conditions and the generally poor condition of cows following the winter drought.

Good rains which fell between June and August throughout a great part of Australia brightened dairy prospects for the new production season. In recent weeks, however, the outlook has deteriorated because of lack of sufficient rainfall in September and October in most areas. Dairy production for the current season is likely to be above the past season but will still be below normal.

Notwithstanding favorable pasture conditions in Cuba, milk production there in the late summer and fall months has been about a third less than in the record year of 1941. The lower output is attributed to a reduction in cow numbers and a diversion of labor and resources to other enterprises.

Widespread drought conditions that prevailed over much of the Union of South Africa through September and early October seriously affected butter production. However, scattered rains were received over much of the Union during the last fortnight of October, and pastures in many areas were rapidly improving during November.

DAIRY PRODUCTS: Output in principal producing and exporting countries,

3rd quarter (calendar) 1945, with comparisons

Country and product	Average 1934-1938	1944				1945				First 3 quarters 1945 1944
		Total 1944	3rd quarter	4th quarter	1st quarter	2nd quarter	3rd quarter	Percent		
Butter a/		1,000	1,000	1,000	1,000	1,000	1,000	1,000		
		pounds	pounds	pounds	pounds	pounds	pounds	pounds		
United States	1,673,328	b/1,487,013	397,751	b/274,596	b/301,028	b/454,458	389,265	94		
Germany	792,000									
Australia	c/437,032	b/714,439	b/61,242	107,693	b/90,686	47,974	58,791	96		
Denmark	400,660	283,952	84,436	62,390	50,705	81,790	90,609	101		
New Zealand - total	d/366,049	b/718,649	b/51,793	b/134,041	112,553	41,221				
Export gradings	e/314,753	b/252,547	b/38,176	b/114,863	94,192	32,460	35,253	118		
Canada	248,119	298,252	109,324	53,207	36,550	96,768	110,990	100		
Netherlands	201,000									
Sweden	151,309	192,471	58,477	42,469	40,871	55,192				
Belgium	46,179	41,041	f/13,312	f/8,137	f/4,144	f/12,628				
Eire	89,400	b/64,848	28,582	b/11,425	b/2,645	19,943	29,306	97		
Argentina	65,742	104,694	17,592	28,572	b/30,714	b/24,187	13,874	90		
Switzerland	62,170	74,950								
Finland	61,287	b/74,950								
United Kingdom i/	44,200	22,400	7,700	1,000	1,500	10,200				
Union of South Africa	27,725	38,600	4,654	10,328	12,682	9,638				
Cheese j/										
United States	643,234	b/1,014,833	b/282,084	b/203,101	b/220,791	b/373,537	322,657	113		
Italy k/	523,518									
Netherlands	266,549									
New Zealand - total	d/201,272	b/216,052	b/31,358	b/96,163	77,103	33,598				
Export gradings	e/194,175	b/196,783	b/16,616	b/84,258	77,795	b/35,289	15,689	114		
Canada	114,699	178,230	77,484	33,403	8,021	63,431	81,776	104		
Switzerland	111,729	93,665								
United Kingdom i/ l/	109,000	40,300	22,400	3,200	2,300	17,000				
Argentina	67,873	159,302	32,233	49,489	b/50,084	b/43,854	29,365	112		
Denmark	68,820	85,979	29,321	12,125						
Australia	c/49,111	77,382	18,011	31,906	b/18,251	8,983	17,882	99		
Sweden	71,269	65,971	21,219	11,076	15,465	26,172				
Union of South Africa	10,195	14,731	2,557	4,796	4,998	3,711				

DAIRY PRODUCTS: Output in principal producing and exporting countries,
3rd quarter (calendar) 1945, with comparisons

Country and product	Average 1934-1938	1944			1945			First 3 quarters 1945 1944
		Total 1944	3rd quarter	4th quarter	1st quarter	2nd quarter	3rd quarter	
		pounds	pounds	pounds	pounds	pounds	pounds	Percent
Canned milk								
United States	2,469,535:b/4	508,460:1	212,553:	877,208:1	1,085,994:1	777,046:1	459,744:	119
United Kingdom i/	378,560:	247,000:	47,400:	9,800:	48,900:	137,600:	-	-
Netherlands	304,896:	-	-	-	-	-	-	-
Canada	92,377:b/1	219,089:b/	66,207:	42,903:	37,488:	82,984:	74,995:	109
Australia	38,867:	100,747:	23,165:	39,558:	25,170:	12,223:	20,645:	95
Denmark	40,785:	-	-	-	-	-	-	-
Switzerland	14,198:g/	10,600:	-	-	-	-	-	-
New Zealand	11,273:m/	18,241:	2,434:	7,530:	5,921:	2,635:	-	-
Cuba	32,564:m/	29,621:	11,098:	8,487:	2,997:b/	3,433:	9,284:	74
Argentina	-	11,226:	3,309:	3,311:	2,134:	1,544:	1,083:	60
Dried milk n/								
United States	m/203,555:	760,793:	203,496:	137,092:	188,550:b/	317,675:	219,000:	116
Netherlands	56,438:	-	-	-	-	-	-	-
United Kingdom i/	33,600:	51,100:	13,700:	2,400:	14,900:	33,300:	-	-
Canada	23,488:b/	46,400:b/	14,857:b/	8,954:	8,352:	17,384:	15,763:	109
New Zealand	17,429:o/	27,388:	5,531:	11,694:	9,115:	3,706:	-	-
Argentina	p/	9,892:	1,918:	4,098:b/	4,290:b/	2,114:	1,165:	131
Australia	16,971:	45,981:b/	11,032:b/	18,246:	10,093:	7,739:	-	106
Belgium	5,500:g/	2,344:	-	-	-	-	-	-
Switzerland	2,381:	-	-	-	-	-	-	-
Denmark	2,205:	-	-	-	-	-	-	-

Office of Foreign Agricultural Relations. Compiled from official sources.

a/ Creamery butter. b/ Revised. c/ Production year beginning July. d/ Production year beginning April.
e/ Production year beginning August. f/ Quarterly figures represent production of all butter. g/ Office
estimate. h/ Total production of all butter amounted to 70,106,000 pounds in 1944. i/ 1944 and 1945
figures are unofficial estimates, and are subject to revision. j/ Factory cheese. k/ Total cheese
(includes cheese made from milk of sheep and goats). l/ Includes farm cheese. m/ Less than a 5-year
average. n/ Total dried whole milk and dried skim milk for human consumption. o/ For 1938 only.
p/ Not available. Quantity small.